

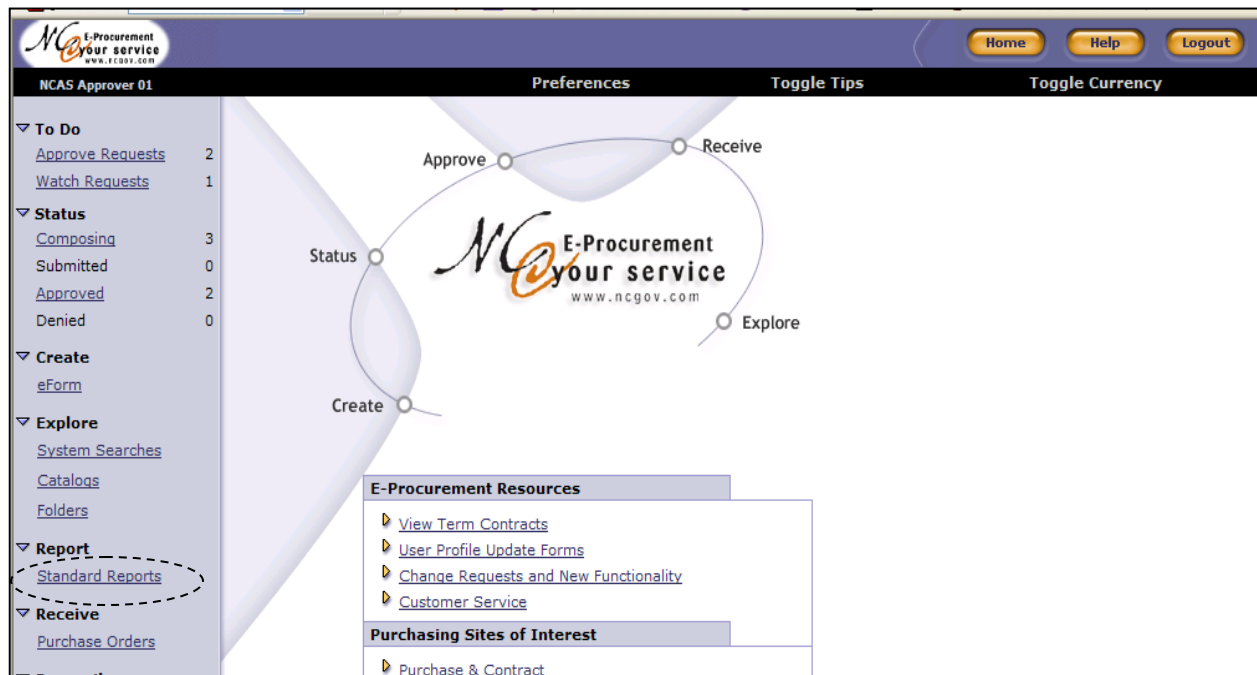
Standard Reports

NC E-Procurement @ Your Service standard reports are designed to provide users with access to a variety of procurement information captured within the system. The E-Procurement reporting screens make reporting on data an easy and intuitive process. NC E-Procurement @ Your Service standard reports offer two choices in report output format: HTML or CSV formats. Both formats may be downloaded and saved to files for future use. The CSV format may be used in other applications like Microsoft Excel.

Users have access to standard reports within NC E-Procurement @ Your Service based on their established roles. Below is a matrix showing which E-Procurement roles have access to which standard reports. Refer to the User eForm process guide for additional information on user roles.

Report Name	Non Integrated Buyer	Non Integrated Approver	LEA/Community College Requestor	LEA/Community College Approver	NCAS Requestor	NCAS Requestor Catalog Only	NCAS Purchasing Agent	NCAS Chief Procurement Officer	NCAS Central Receiver	All - Security Administrator
Order Summary By Supplier	X	X			X	X	X	X		
Orders Overview		X								
Items Not Yet Received					X	X	X	X		
Items Received					X	X	X	X		
Orders Due Soon					X	X	X	X		
Overdue Orders					X	X	X	X		
Action Date Report	X	X					X	X		
Commodity Details	X	X	X		X	X	X	X	X	
Requisition Details	X	X			X	X	X	X		
Requisitions to Be Approved	X	X	X		X	X	X	X	X	
Requisition Summary	X	X			X	X	X	X		
Supplier Details	X	X	X		X	X	X	X	X	
Catalog Vs. Non-Catalog Orders							X	X		
Requisition Average Cycle Time Analysis							X	X		
Requisition Volume Over Time		X					X	X		
Management Chain										X
User By Entity										X
User By Entity No Supervisor										X

Additionally, some users with the Cross-Entity Reporting permission have the ability to view purchasing data for state entities beyond their own. The Central E-Procurement Reporting Team including the Office of State Controller (OSC), Department of Administration (DOA) – Purchase & Contract (P&C), Information Technology Services (ITS), and the Historically Underutilized Business (HUB) office have cross-entity reporting capabilities. These agencies use cross-entity reporting to fulfill their statutory funds management obligations and to analyze state spend in order to negotiate the most favorable terms with vendors. Additionally, some state agencies with management responsibilities over multiple entities (e.g. Department of Health and Human Services) have cross-entity reporting capabilities for any entity under their central management.



1. Select the '**Standard Reports**' link in the Shortcut Menu.

The screenshot shows the 'Standard Reports' selection interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' buttons. Below this, a secondary bar contains 'NCAS Approver 01', 'Preferences', 'Toggle Tips', and 'Toggle Currency'. A left sidebar lists three steps: '1 Select Category', '2 Select Report', and '3 Run Report'. The main content area is titled '1 Select Report Category' and 'Standard Reports'. It features five radio buttons for selection: 'Orders' (selected), 'Receiving', 'Requisition', 'ROI', and 'Users'. Below the radio buttons, a yellow message bar states 'You currently have no saved report queries'. At the bottom right of the main area, there are 'Next >' and 'Exit' buttons, with the 'Next >' button circled by a dashed line.

2. Select the radio button beside the appropriate report category: Orders, Receiving, Requisition, ROI, or Users.

Note: The standard reports available to each user are based on the user's permissions. See the matrix at the beginning of this course for additional information.

3. Click '**Next**'.

Note: Each report category contains different reports. See section 3.0 Standard Report Descriptions by Category for specific details on each report.

NCAS Requestor 01

Preferences Toggle Tips Toggle Currency

1 [Select Category](#)

2 [Select Report](#)

3 [Run Report](#)

2 **Select Report** **Standard Reports**

Select a report. If you don't see the report you need, return to the previous screen and select a different category. [How To](#)

☒ Order Summary by Supplier
Summarizes orders based on supplier, entity and commodity.

You currently have no saved report queries

< Prev Next > Exit

4. Select the radio button beside the report to be run.

Note: The reports available are based on the report category selected on the previous screen. This is an example only.

5. Click '**Next**'.

3 Run Report Standard Reports

Specify the report format and basic filters to use to limit report results. If you don't specify filter values, the report will include all values. Use the Advanced tab to include or omit fields from the report results, and to specify advanced filters. [How To](#)

Report Title: Order Summary by Supplier
Report Category: Orders
Report Format: HTML
☐ Create Chart (HTML only)

Basic Advanced

Filter Name	Value
Entity:	42 [select]
Supplier Name:	(select a value) [select]
Commodity Code:	(select a value) [select]
Ordered Date:	No Choice

6. Choose the desired report output format in the **'Report Format'** dropdown box: HTML or CSV.

7. Enter the search criteria.

Note: The search criteria may differ according to which report is being run.

Note: For more options, click the **'Advanced'** tab.

Basic **Advanced**

Name	Display	Filter	Value
Commodity Code:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(select a value) [select]
Commodity Code:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Entity:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	42 [select]
Extended Price:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Order ID:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ordered Date:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Choice
Organization:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Requisition #:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Status:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Supplier Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(select a value) [select]
Supplier:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

8. Select **'Run'**.

2.0 Saving Standard Reports

1. Select the **'Save'** button.

2. Enter the Report Name and Description in the pop-up box.
3. Click the **'OK'** button.

Note: Saved reports will be visible after clicking the **'Standard Report'** link from the E-Procurement Home Page.

3.0 Standard Report Descriptions by Category

Orders

- **Order Summary by Supplier:** Provides a summary of orders including supplier, entity, and commodity where the requisition has a status of "Ordered" or "Canceled".

Receiving

- **Items Not Yet Received:** Provides a summary of items that have been ordered but not yet received.
- **Items Received:** Provides a summary of the number of line items received by a particular user during a given time period.
- **Orders Due Soon:** Provides a list of orders that should arrive soon based on the expected due date.
- **Overdue Orders:** Provides a list of purchase orders that are overdue (based on line item expected time of arrival – ETA), in the sense that the order should have been received but has not yet been marked as received.

Requisition

- **Action Date Report:** Provides a list of eRequisition(s) (with a status of Submitted or greater) with action dates and reasons.
- **Commodity Details:** Provides a list of line items on selected eRequisition(s) including the commodity code for each line item.
- **Requisition Details:** Summarizes a selection of eRequisitions including both header and line item detail.
- **Requisitions to be Approved:** Provides a list of only the eRequisitions waiting for approval or eRequisitions that have been explicitly denied.
- **Requisition Summary:** Provides a summary of eRequisitions submitted during a particular time period.
- **Supplier Details:** Provides a summary of suppliers and their respective commodities for purchase orders that have been issued.

ROI

- **Catalog Vs. Non-Catalog Orders:** Displays a graph of eRequisitions based on dollar amount differentiating between catalog and non-catalog items over a selected period of time.
- **Requisition Average Cycle Time Analysis:** Provides the average time taken to approve eRequisitions over a period of time based on the eRequisition total amount.
- **Requisition Volume Over Time:** Provides a graph of eRequisitions based on dollar amount that have been submitted through the NC E-Procurement Service during a particular time period.

Users

- **Management Chain:** Provides a list of all users within an entity along with their management level and chain.
- **User By Entity:** Provides a list of all users within an entity with a supervisor.
- **User By Entity No Supervisor:** Provides a list of all users within an entity that do not have a supervisor in the system.